



International Visitor Volumes for Arizona:

2016 Analysis



TOURISM
ECONOMICS

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Overview

- An understanding of the volumes and trends of key international markets is critical to sound destination marketing.
- However, government data does not provide adequate sample sizes to produce reliable estimates of international markets for Arizona.
- Tourism Economics has developed an international visitor tracking model for Arizona that incorporates multiple data sources to produce reliable volumes and trends for 11 international markets plus total overseas.
- The model weights aviation (OAG bookings by origin and destination), and credit card statistics (Visa cardholders by country of origin) to stabilize results over time.
- Weights are based on historic correlations with government data over time.

Overseas modeling

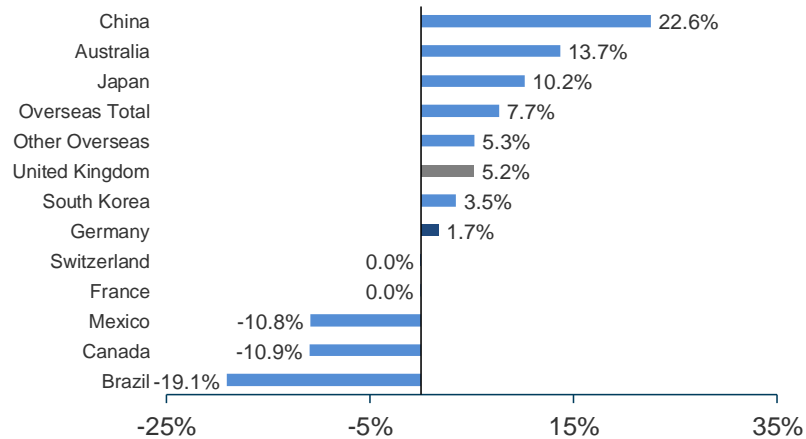
- The Arizona tracking model, developed by Tourism Economics (TE), uses multiple data sources to track year-over-year trends in overseas visitation. This produces more credible trends than a single survey can provide. Sources include:
 - VisaVue: Number of unique cards used by international visitors by market;
 - OAG: Number of passengers arriving from international markets; and
 - Bureau of Transportation Statistics (BTS): Number of Mexico border crossings into Arizona.
- For overseas markets, 2011 is used as benchmark, using NTTO (Nat'l Travel and Tourism Org.) volumes of visitors to AZ.
- For Canada, Statistics Canada data are used as a benchmark through 2013.
- The NTTO survey of international air travelers is used to set historical levels and the I-94 dataset is used as an input into trend analysis. These inputs were not used in the 2016 analysis due to changes in methodology and processing delays.

International travel to Arizona, VisaVue vs OAG

VisaVue

International Visits to Arizona

% Change, 2016

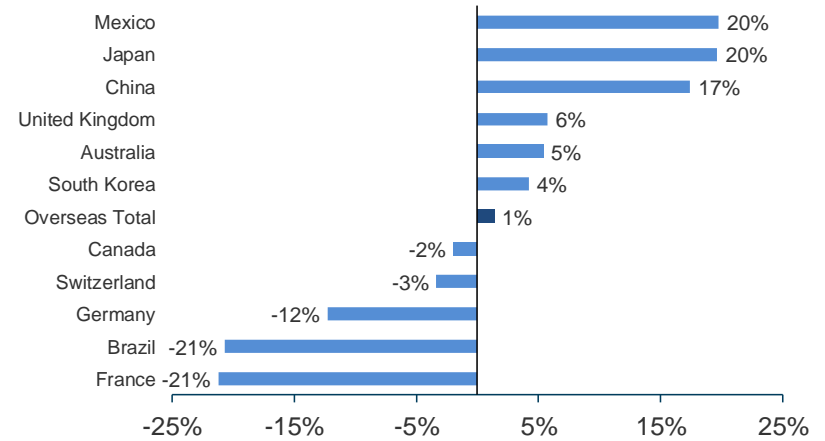


Source: VisaVue

OAG

International Visits to Arizona,

% Change, 2016

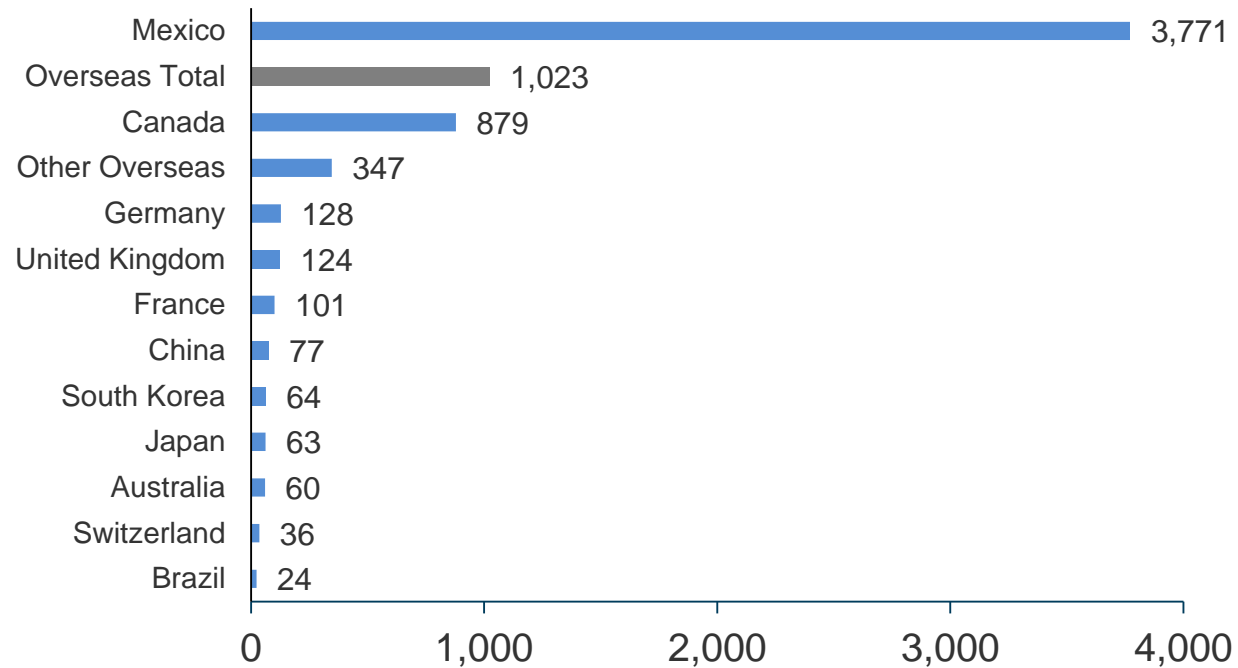


Source: OAG

Arizona international travel, summary

International Visits to Arizona

Levels, in thousands, 2016

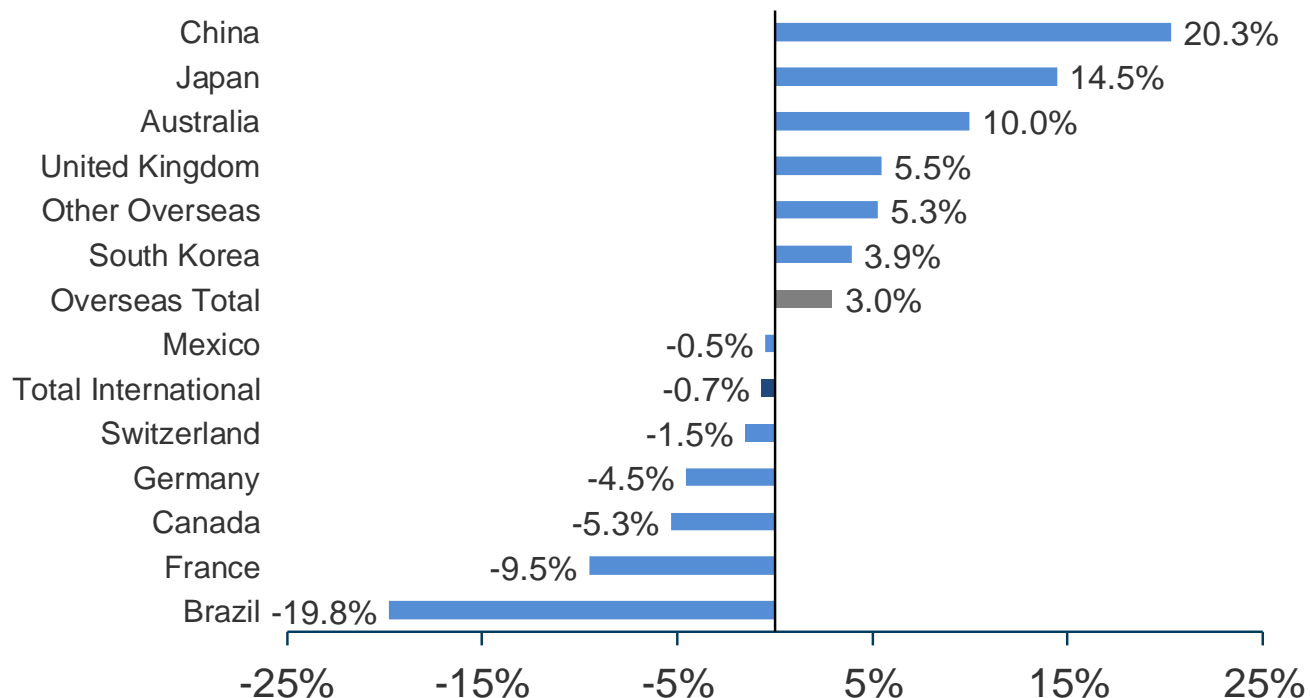


Source: Tourism Economics

Arizona international travel, summary

International Visits to Arizona

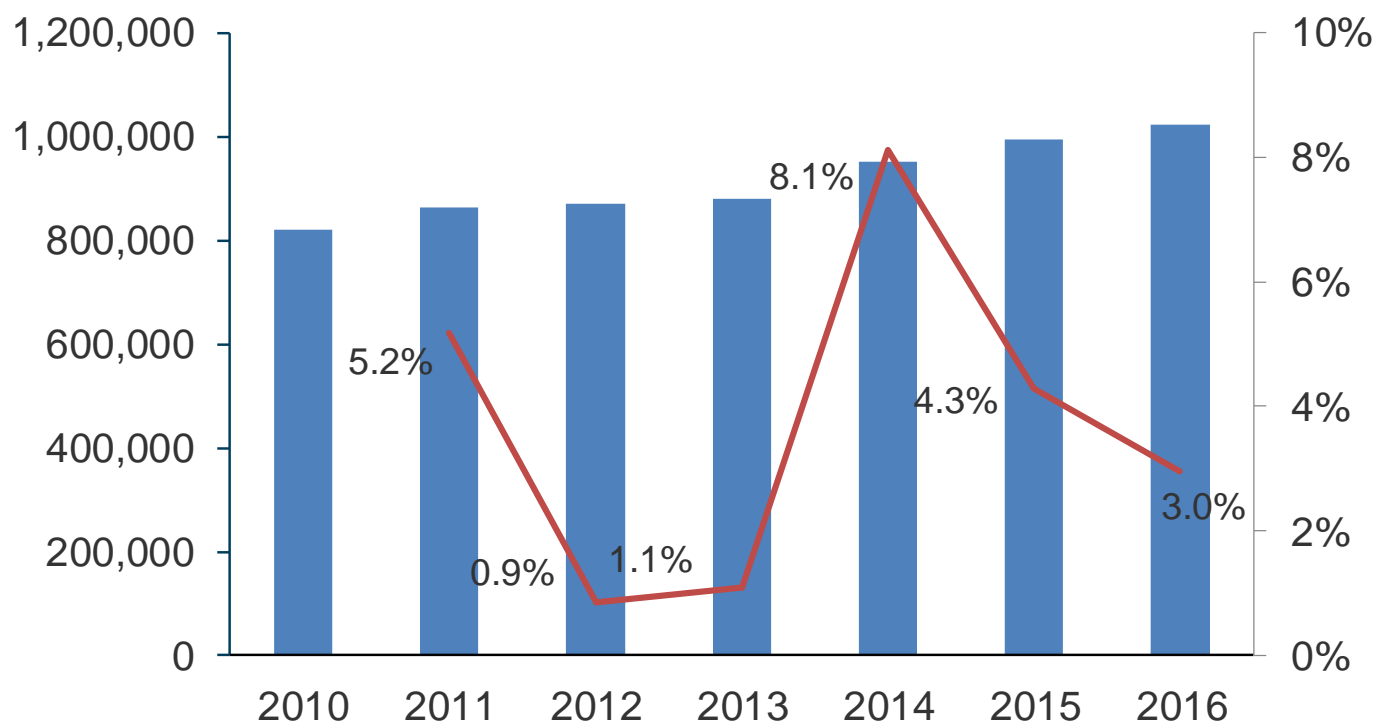
% Change, 2016



Overseas summary

Overseas travel to Arizona

Levels and % change (right)



International visits to Arizona, levels

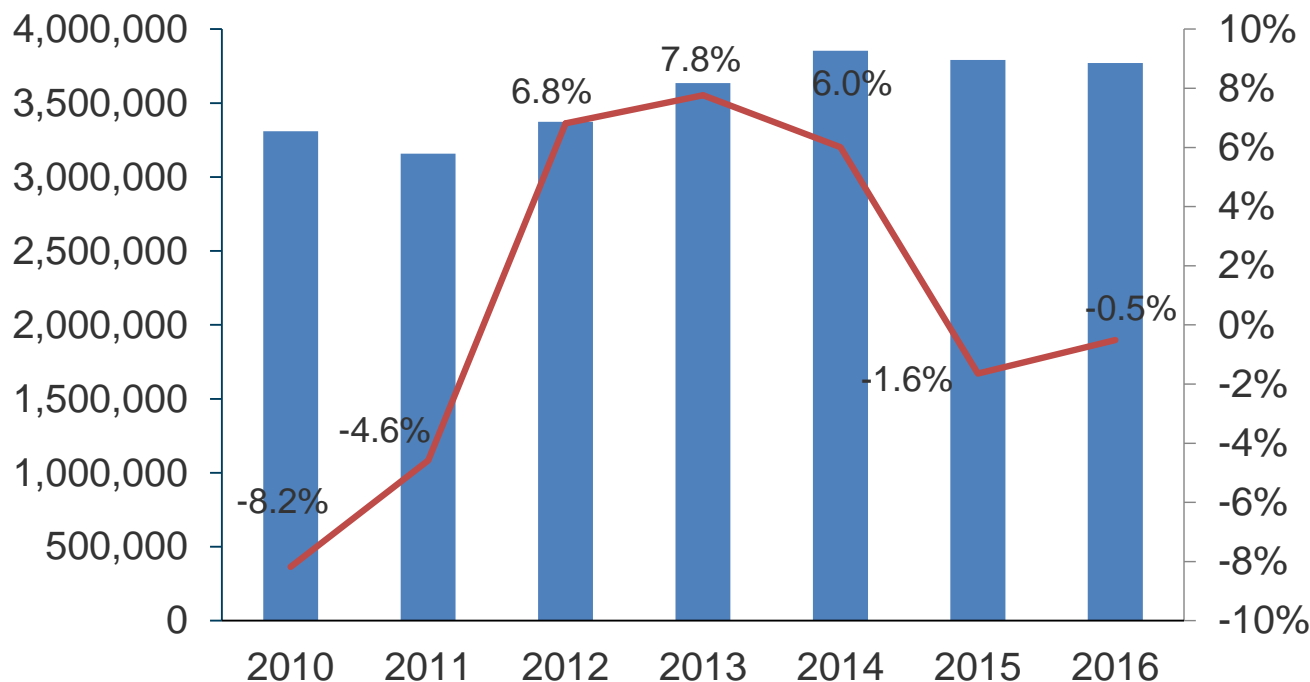
International Overnight Visits to Arizona							
	2010	2011	2012	2013	2014	2015	2016
Mexico	3,310,184	3,158,622	3,373,909	3,635,939	3,854,431	3,790,919	3,771,407
Canada	650,000	703,800	728,000	850,200	896,467	928,051	878,647
Germany	116,580	120,000	120,229	119,971	127,705	133,903	127,823
United Kingdom	131,107	123,000	117,000	114,186	116,542	117,581	124,013
France	97,108	110,000	106,865	105,846	113,385	111,960	101,303
China	20,972	25,000	31,000	36,705	52,105	63,911	76,884
South Korea	41,701	40,000	44,111	52,725	54,015	61,128	63,524
Japan	40,931	45,000	47,015	49,080	51,602	54,803	62,724
Australia	40,812	44,000	45,803	43,711	47,535	54,466	59,908
Switzerland	35,507	39,000	36,674	34,380	36,554	36,502	35,946
Brazil	20,349	23,000	27,001	27,978	30,992	29,649	23,784
Other Overseas	276,324	295,000	295,650	296,194	321,878	329,263	346,636
Overseas Total	821,391	864,000	871,347	880,777	952,313	993,167	1,022,545
Total International	4,781,575	4,726,422	4,973,256	5,366,916	5,703,210	5,712,138	5,672,599

International visits to Arizona, % change

International Overnight Visits to Arizona						
	2011	2012	2013	2014	2015	2016
Mexico	-4.6%	6.8%	7.8%	6.0%	-3.7%	-0.5%
Canada	8.3%	3.4%	16.8%	5.4%	3.5%	-5.3%
Germany	2.9%	0.2%	-0.2%	6.4%	4.9%	-4.5%
United Kingdom	-6.2%	-4.9%	-2.4%	2.1%	0.9%	5.5%
France	13.3%	-2.9%	-1.0%	7.1%	-1.3%	-9.5%
China	19.2%	24.0%	18.4%	42.0%	22.7%	20.3%
South Korea	-4.1%	10.3%	19.5%	2.4%	13.2%	3.9%
Japan	9.9%	4.5%	4.4%	5.1%	6.2%	14.5%
Australia	7.8%	4.1%	-4.6%	8.7%	14.6%	10.0%
Switzerland	9.8%	-6.0%	-6.3%	6.3%	-0.1%	-1.5%
Brazil	13.0%	17.4%	3.6%	10.8%	-4.3%	-19.8%
Other Overseas	6.8%	0.2%	0.2%	8.7%	2.3%	5.3%
Overseas Total	5.2%	0.9%	1.1%	8.1%	4.3%	3.0%
Total International	-1.2%	5.2%	7.9%	6.3%	-1.2%	-0.7%

Mexico travel to Arizona

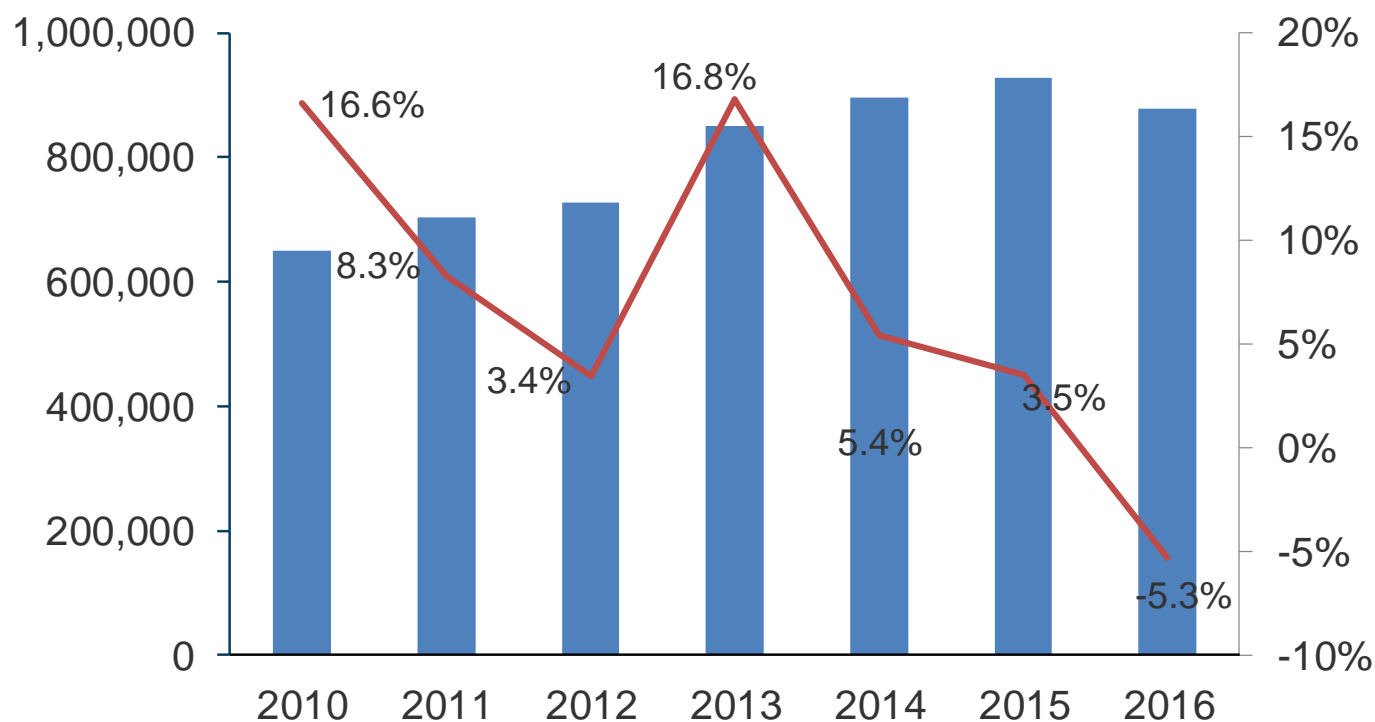
Levels and % change (red line, right axis)



Sources: Tourism Economics

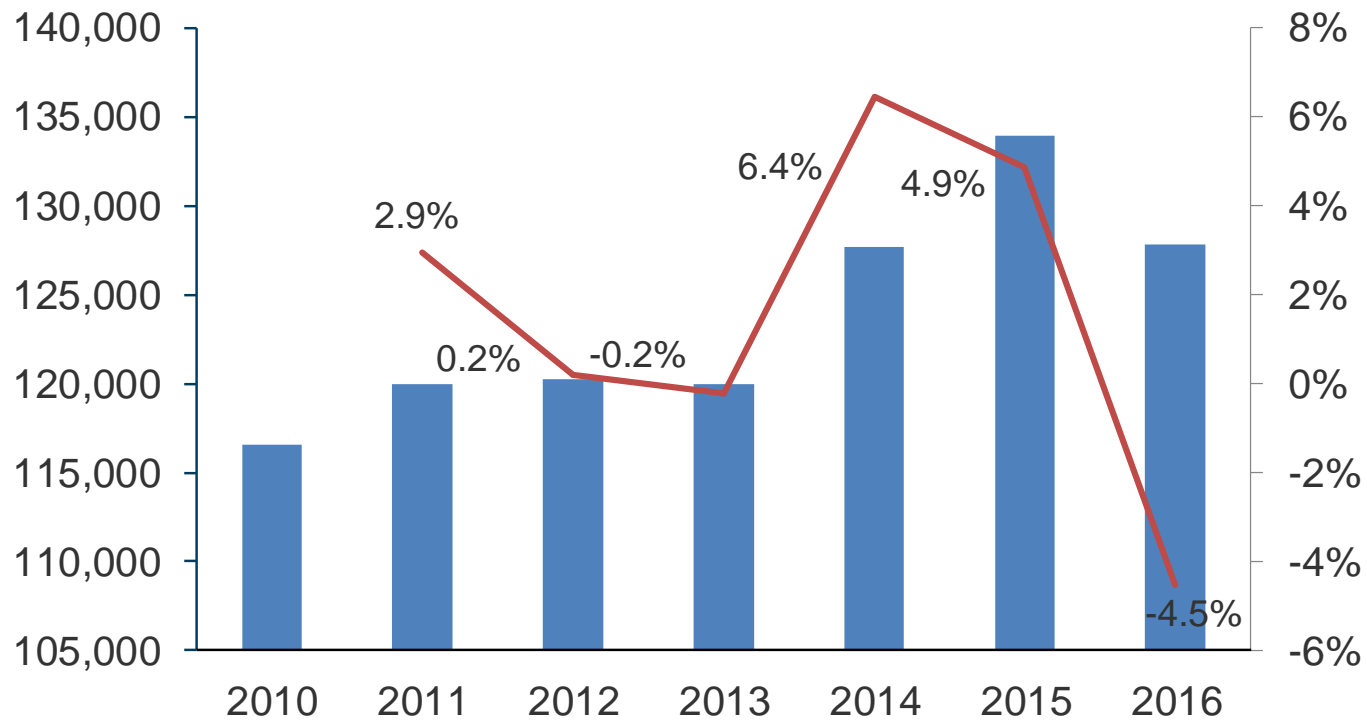
Canada travel to Arizona

Levels and % change (red line, right axis)



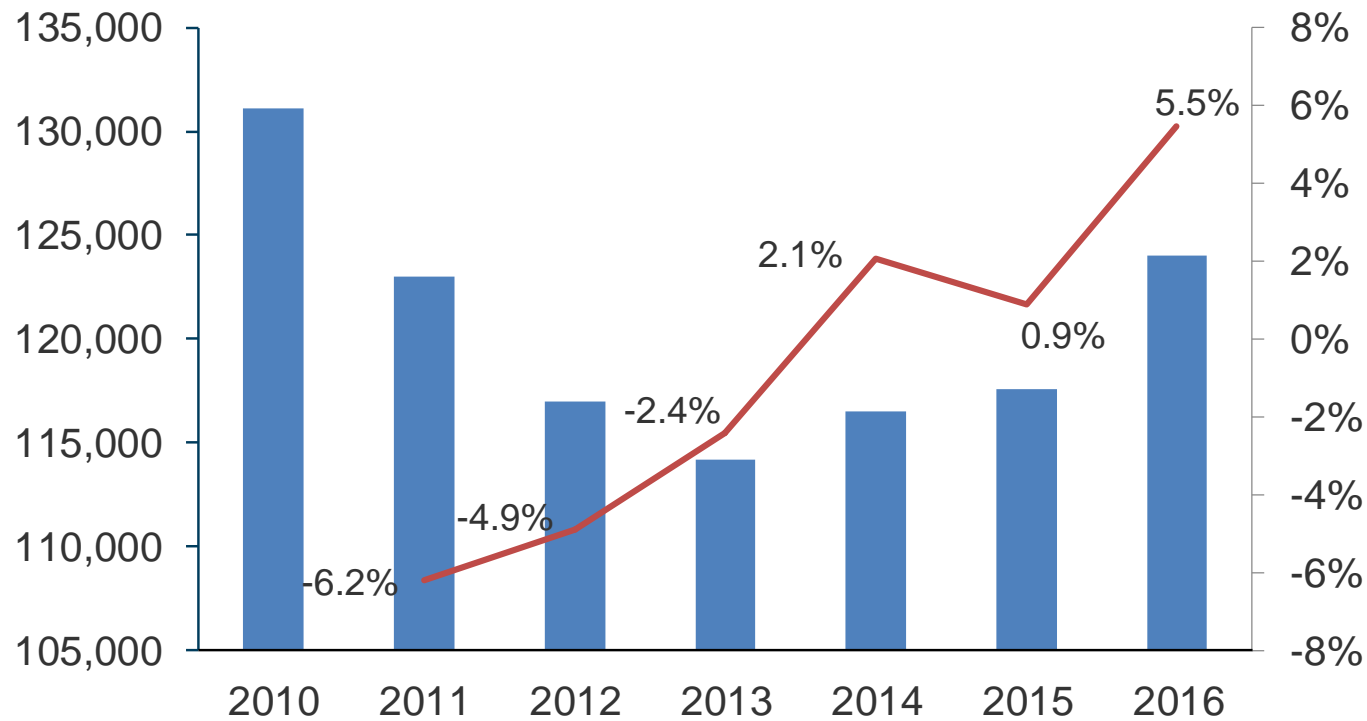
Germany travel to Arizona

Levels and % change (red line, right axis)



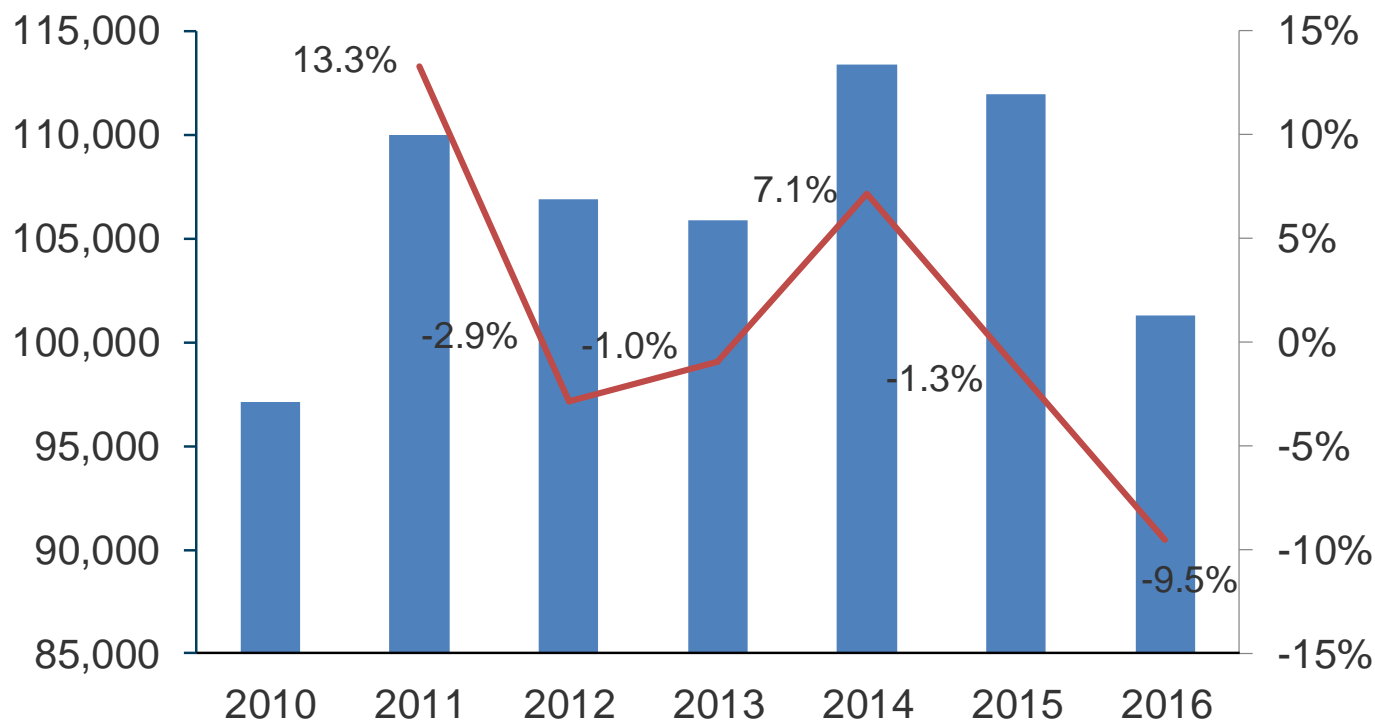
UK travel to Arizona

Levels and % change (red line, right axis)



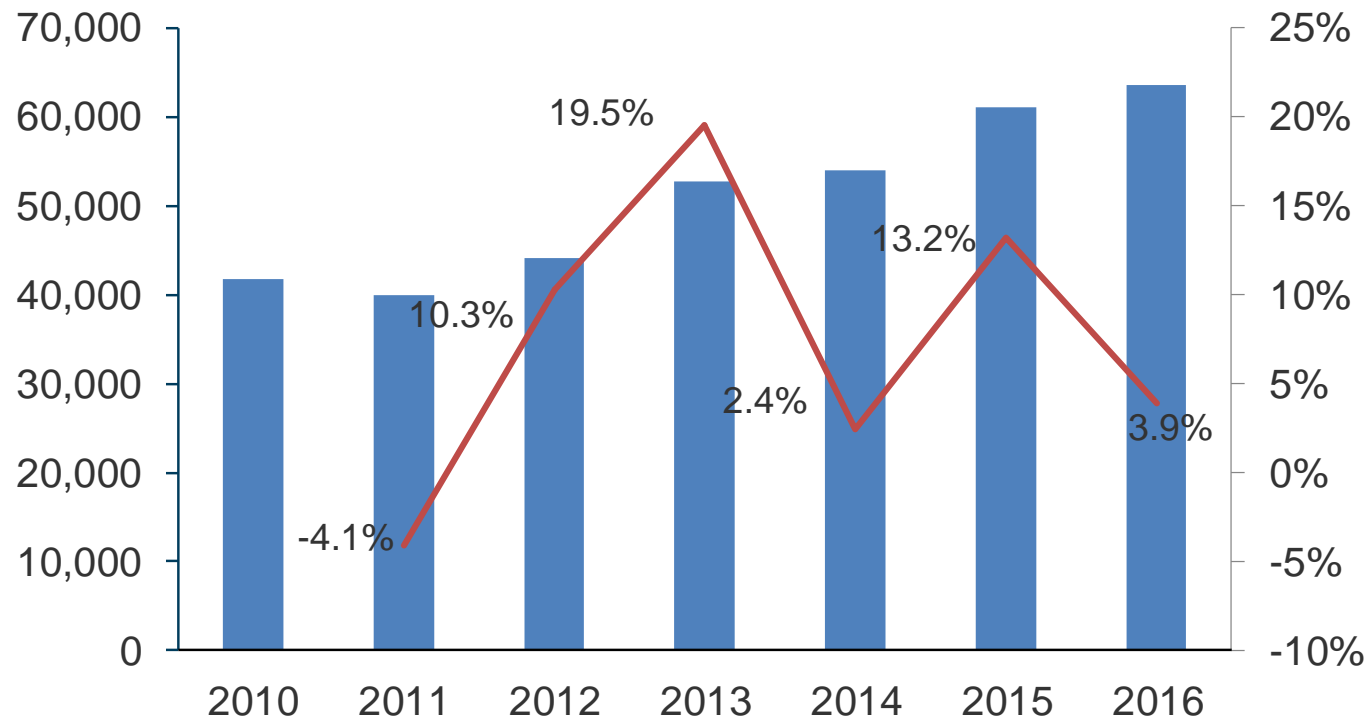
France travel to Arizona

Levels and % change (red line, right axis)



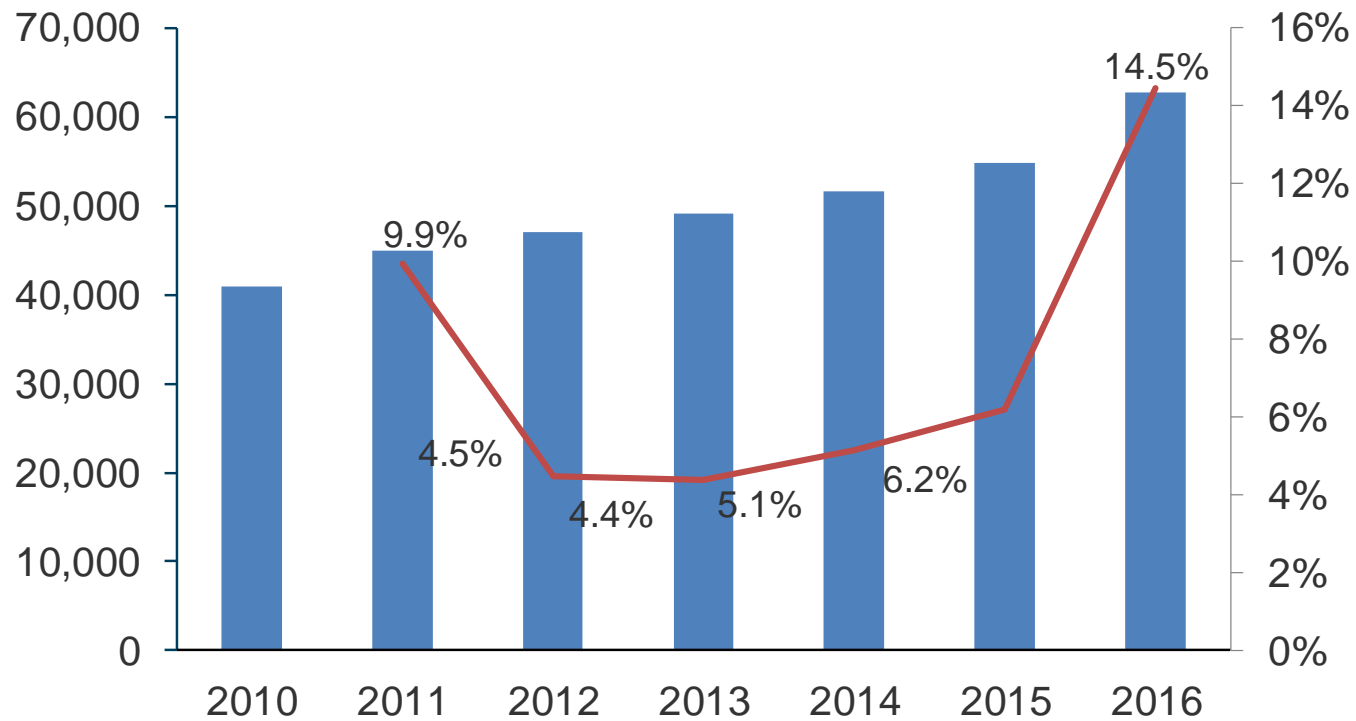
South Korea travel to Arizona

Levels and % change (red line, right axis)



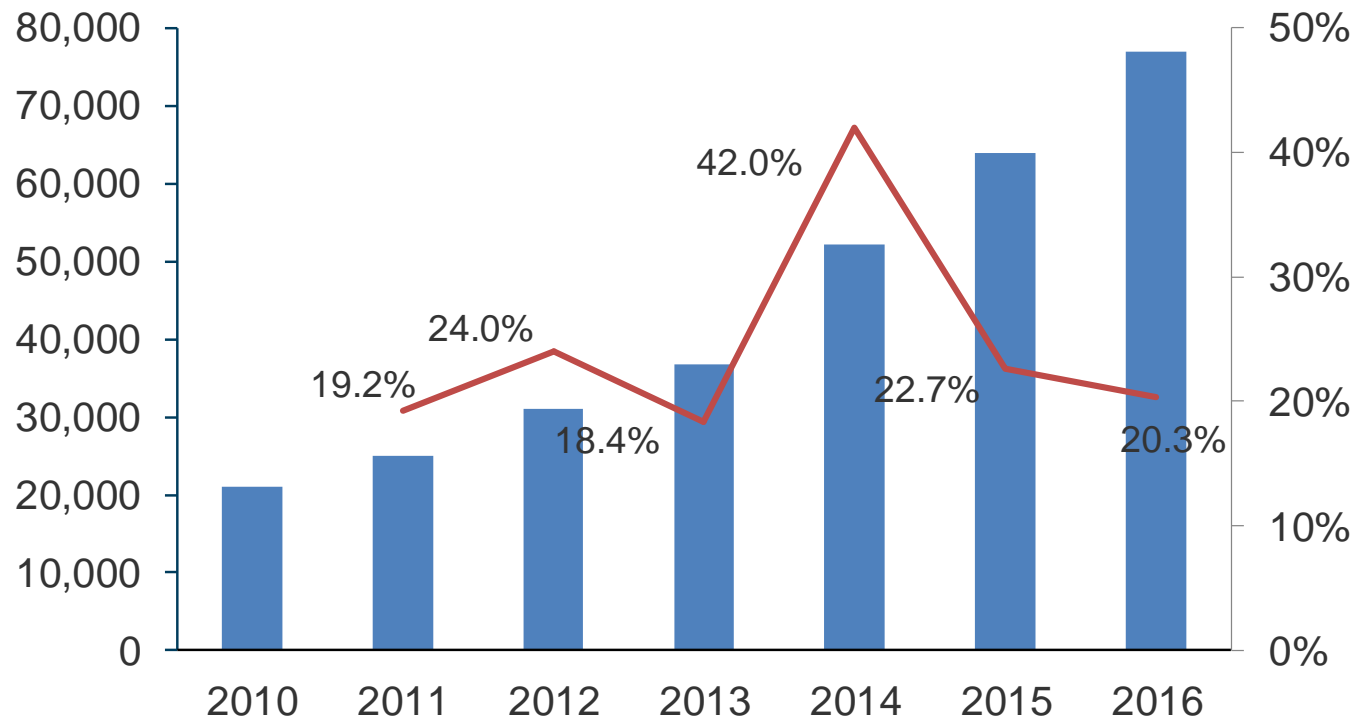
Japan travel to Arizona

Levels and % change (red line, right axis)



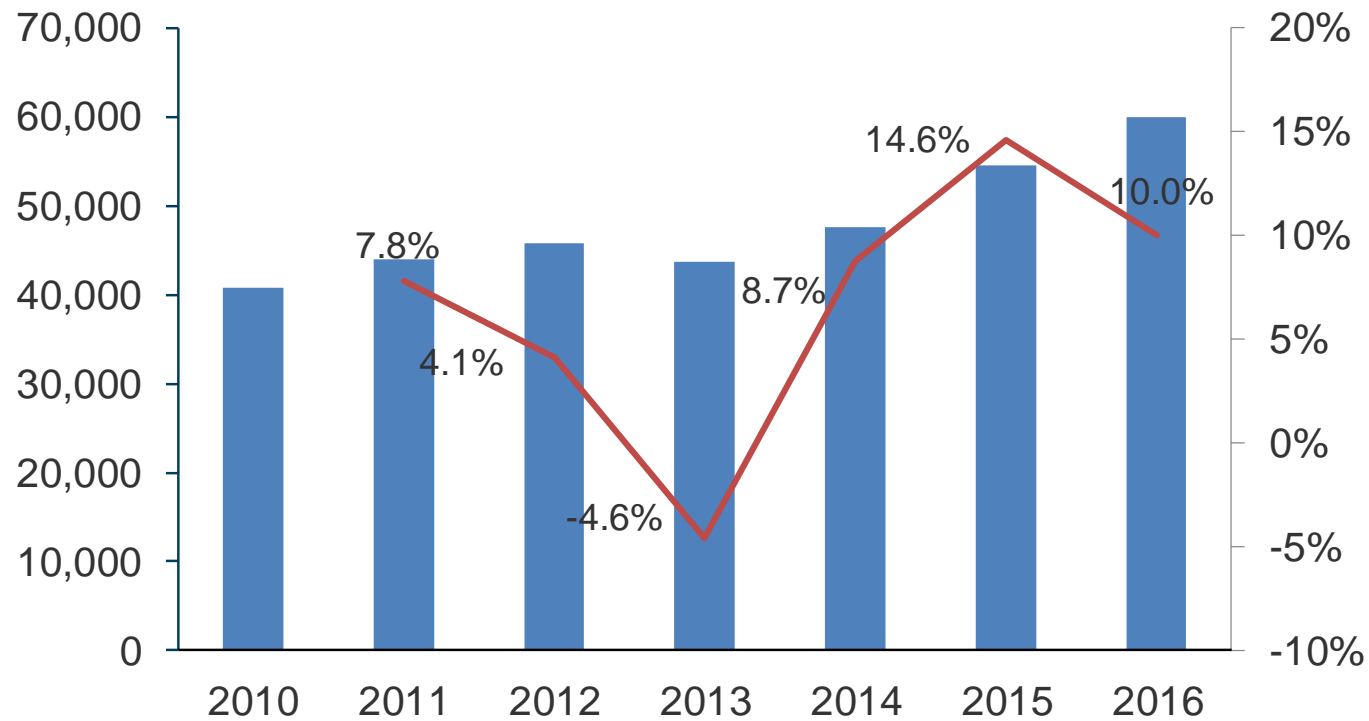
China travel to Arizona

Levels and % change (red line, right axis)



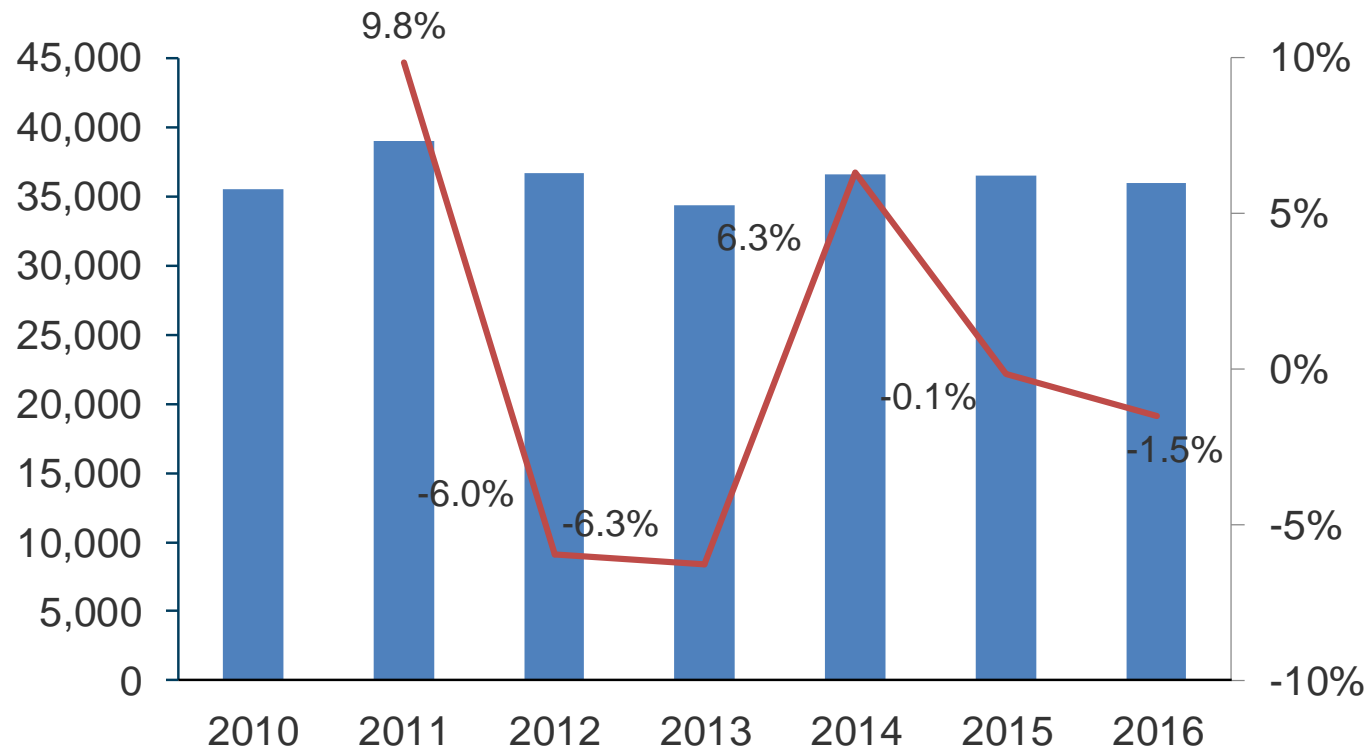
Australia travel to Arizona

Levels and % change (red line, right axis)



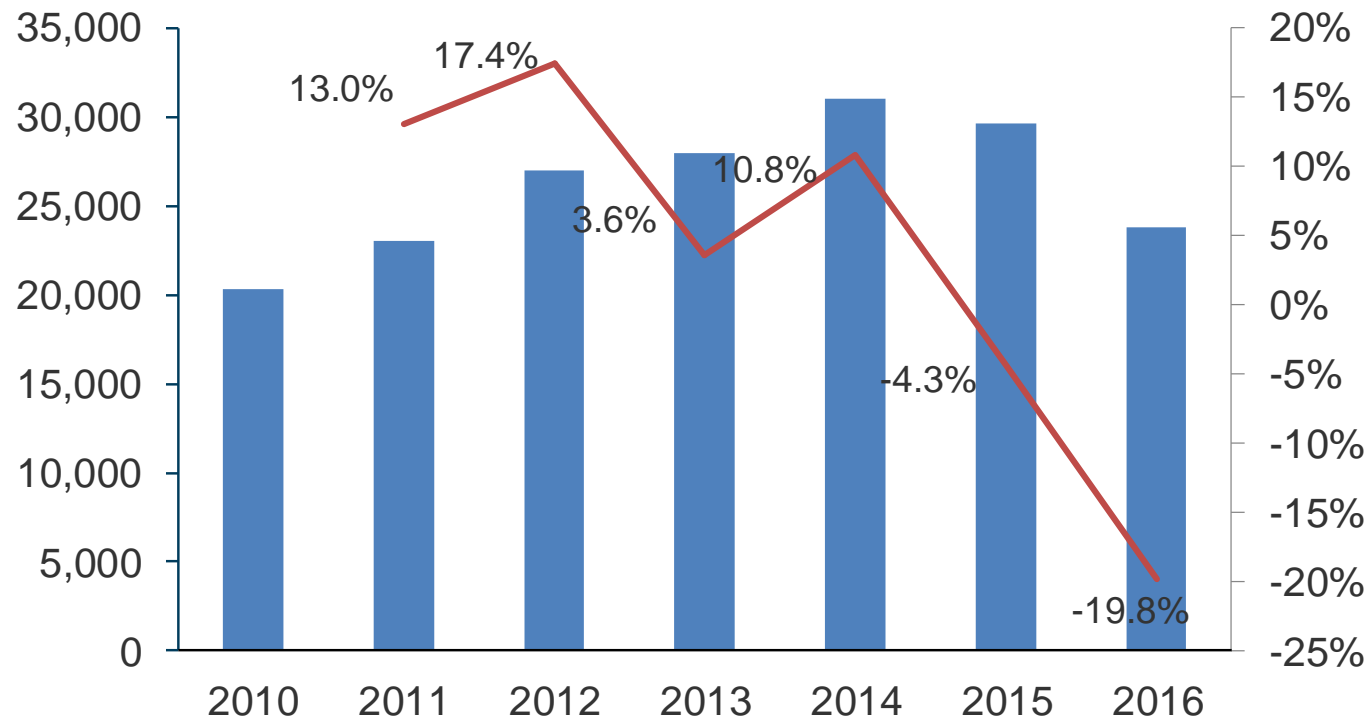
Switzerland travel to Arizona

Levels and % change (red line, right axis)



Brazil travel to Arizona

Levels and % change (red line, right axis)





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For more information:

info@tourismeconomics.com